Module 7

Chapter 4

Training Completions and Evaluations

Chapter Overview

Introduction

This chapter explains the processes related to documenting training completions and evaluations and required training to include updating the employee's record. It also includes retrieving required and completed training, and attendee lists.

Chapter Contents

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Chapter Overview, Continued

Who Does It

Components will determine who has this responsibility.

Before You Begin

Employee's training history both completions and non-completions will be recorded in Oracle HR, **People** window (Special Information Type). Training history does not reside in OTA.

Before training is recorded, business rules require course evaluations by both the employee and supervisor be completed. Once the evaluations have been completed, the Evaluation report is set to run daily, and the enrollment status is shown as "Completed."

Each location, normally the OTA Training Administrator, must set up daily Reports to run Course Evaluations for the employees on the day after a course is scheduled to complete. **This is a one-time set up**. See Chapter 6 for instructions on **Submit Course Evaluation to the Employee** report.

One-Time Events, although an Evaluation is not required, must have the **Submit One Time Event Update HR** report turned on in order for the completed training to flow to Oracle HR. **This is a one-time set up**. See Chapter 6 for instructions.

Although every employee is scheduled to have a log on and ID capability, all may not have immediate access to a PC. In the cases where an employee does not have a Civilian Inbox, the evaluation will be sent to the supervisor or training monitor as determined by the Component.

You can also record employee's training, such as self-development, by accessing the **People** window (Special Information Type) Completed Training Window without going through any enrollment process in OTA.

The Completed Training window populates the Activity Type and Course Name (bottom of window) when OTA is used to enroll an employee. **Course Title** does not populate. However, if you input training completions external to OTA following this procedure, you must type in the Course Title. You can also select the Activity Type, which will then open the Course Name and give you access to the Course Catalog.

Course Name from the Completed Training window, not Course Title, prints on the Employee Career Brief. You can copy and paste the Course Name into the Course Title data field before printing the brief, if you desire.

Managing Completions and Evaluations

Purpose

This section will show you how both evaluations and completion certifications are processed by the employee and supervisor prior to forwarding for inclusion in the employee's record. On the day after graduation of the Event, OTA will flow the Employee Course Evaluation to the appropriate person.

To the employee, who will	Then
• Annotate training was completed and grade received. • Complete the **Course Evaluation**.	Forward to the supervisor for completion of the Manager Evaluation.
Then	
The supervisor will: • Complete **Manager Course Evaluation**. • **Certify completion**. • **Save**. ◦ Completed Training in HR will be updated.	**If training was not completed, the supervisor will:** • Notify appropriate personnel.
Note: If your Component chooses to use an external evaluation for a particular Event, you must first turn off the **Submit Course Evaluation to the Employee** Report. Change the Enrollment Status on the **Enrollment Summary** window or the **Enrollment Details** window to "Completed," save your action, and the Event is recorded automatically in the employee's training history in Oracle HR.	

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Managing Completions and Evaluations, Continued

Completing the Evaluations

This describes the procedures that employees and managers will normally follow in completing a course evaluation.

Step	Action
1	On the day after graduation, the **Employee Course Evaluation** opens in the Training Contact or the employee's Workflow Inbox. If the employee does not have a Workflow Inbox, • a printed copy of the Evaluation can be provided to the employee or • The employee can complete the evaluation on the Training Contact's computer.

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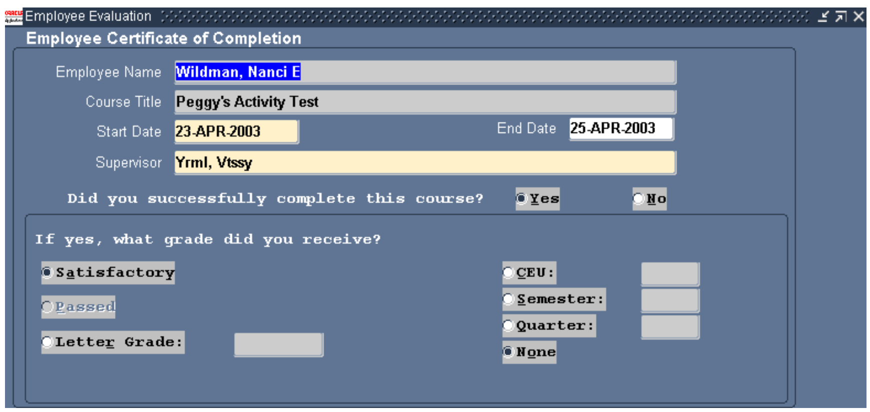
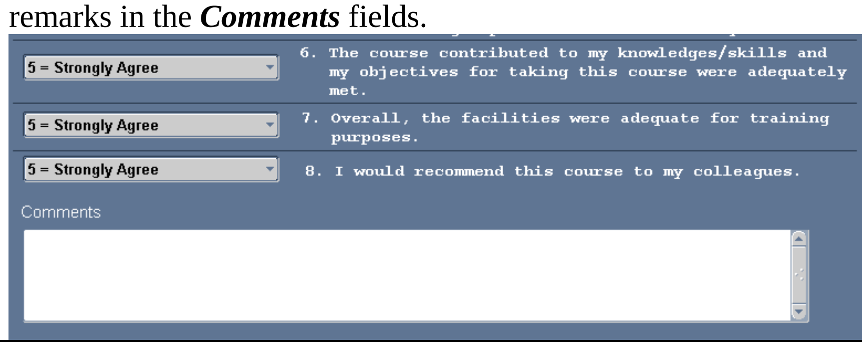
Completing the Evaluations (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>The employee completes the Evaluation, saves it, and forwards it to the manager/supervisor by selecting a name from the LOV. The Manager/Supervisor receives it and clicks <Respond> to open and complete the Manager Course Evaluation.



</td></tr>
<tr><td>3</td><td>The supervisor responds to the three statements on the Evaluation using the drop down menu for each and places any free-flow remarks in the Comments fields.



</td></tr>
</table>

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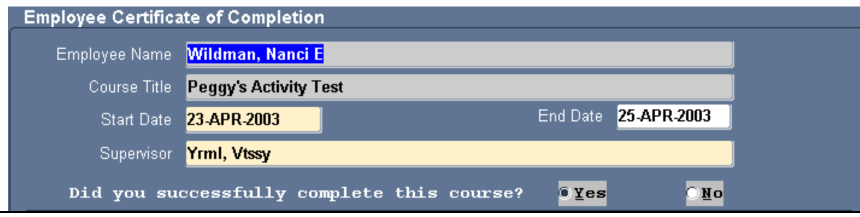
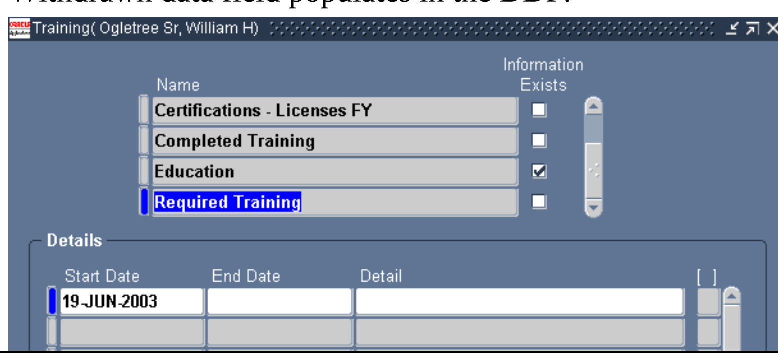
Managing Completions and Evaluations, Continued

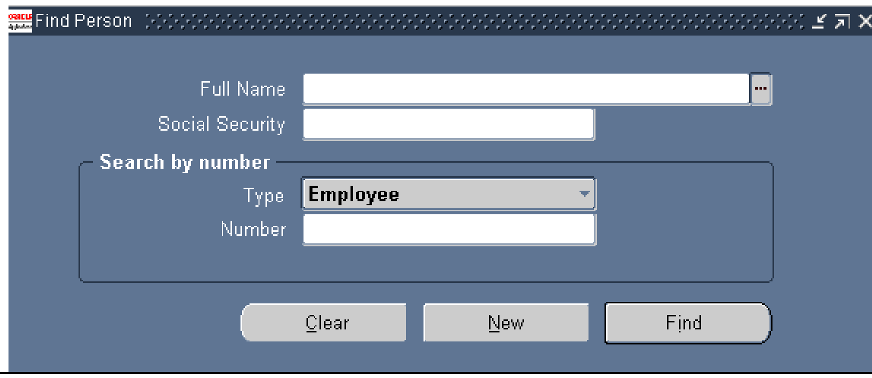
Completing the Evaluations (continued)

Step	Action
4	If the supervisor needs to view the Employee Evaluation, the supervisor clicks the **<Employee>** Taskflow Button on the **Manager Course Evaluation** window. The Employee Course Evaluation opens. The Employee Course Evaluation now has a <**Manager>** Taskflow Button used to toggle back to the **Manager Course Evaluation** window. 
5	Once the supervisor completes the evaluation, certifies completion, and saves it, the training occurrence will flow to HR Completed Training. **Note:** The Evaluation(s) flow to the HR office that initiated the report. It does not display in a Civilian Inbox. Personnel in the HR office can access and print the Evaluations by going to the **Navigation List** and clicking *Employee Course Evaluation* or *Manager Course Evaluation*. Scroll through all evaluations by placing your cursor in the ***Course Title*** data field of the ***Employee Course Evaluation*** and clicking the Page Up/Down keys.
6	If the employee has clicked the No radio button and inputs a Date Withdrawn, further action is not required by the Supervisor on the evaluation except to save it. The incomplete training flows to HR with a Start Date and Date Withdrawn in the Details Region before opening the **Completed Training** window (DDF). The Date Withdrawn data field populates in the DDF. 

Recording Completed Training in HR

Recording Completed Training in HR

This procedure is for documenting training not completed through the OTA process; e.g., self-development, completed at another Component and not recorded.

Step	Action
1	**Navigation Path** → *SIT Completed/Required Training* → <**Open**>.
2	The **Find Person** window opens. With the cursor in the ***Full Name*** data field, click the LOV and click the employee's name or query for the employee's name or type in the name exactly as it appears on the database. Click the <**OK**> button. 
3	The **Full Name** and **Employee Number** fields populate. Click the <**Find**> button.
4	The **People** window opens with the data fields populated. Click the <**Special Info**> button.
5	The **Special Information** Descriptive Flexfield opens with the *Current Record Indicator* next to it. Use the left scroll bar to select ***Completed Training***. Click the ***Detail*** data field to display the employee's completed training.

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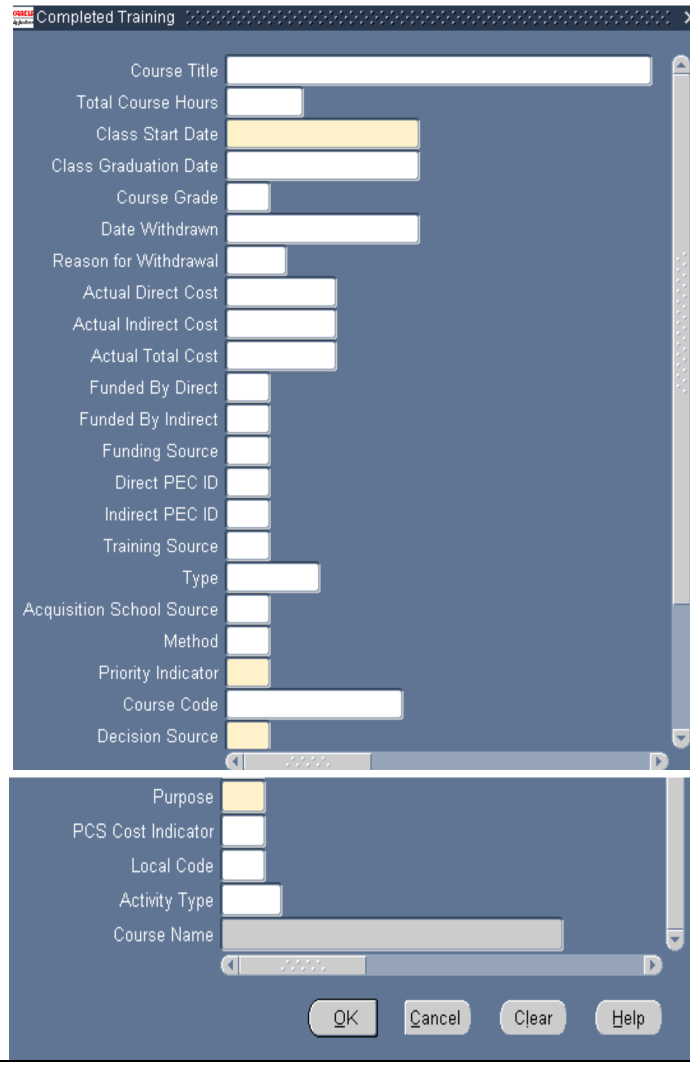
Recording Completed Training in HR, Continued

Recording Completed Training in HR (continued)

Step	Action
6	The **Completed Training** Descriptive Flexfield opens. Use the LOV to input the following data fields: **Note:** Not all fields need to be completed. Each Component selects the items required by their training policy, in addition to those required by OPM.



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Recording Completed Training in HR, Continued

Recording Completed Training in HR (continued)

Step	Action
6 (cont)	(see table below)

Data Field	Description/Action
Course Title (120 characters)	Type the title in ALL CAPS. This is for training completed outside the OTA process. Required field.
Total Course Hours	Total for duty and non-duty. Required field.
Class Start Date	Type in the date. Required field. Ex: 01-Mar-2003
Class Graduation Date	Type in the date. Required field. This can be future-dated and HR still accepts it.
Course Grade	Click the LOV to select letter grade.
Date Withdrawn	Type in the date, if appropriate. Auto-populates when Evaluations are used or Enrollment Details changed.
Actual Direct Cost	Type in Direct Cost dollar amount.
Actual InDirect Cost	Type in Indirect Cost dollar amount.
Actual Total Cost	System auto-populates total amount.
Funded by Direct	Click the LOV to make a selection.
Funded by Indirect	Click the LOV to make a selection.
Funding Source	Click the LOV to make a selection.
Direct PEC ID (AF use)	Type in the number.
Indirect PEC ID (AF use)	Type in the number.
Training Source	Click the LOV to make a selection. Required field.
Type	Click the LOV and query, i.e.; %NV_% for Navy.
Method	Click the LOV to make a selection. Required field.
Priority Indicator	Click the LOV to make a selection. Required field.

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Recording Completed Training in HR, Continued

Recording Completed Training in HR (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6
(cont)</td><td>
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Course Code</td><td>Optional use.</td></tr>
<tr><td>Decision Source</td><td>Click the LOV to make a selection. Required field.</td></tr>
<tr><td>PCS Cost Indicator</td><td>Click the LOV to make a selection.</td></tr>
<tr><td>Local Code</td><td>Optional use.</td></tr>
<tr><td>Major Claimant MAJCOM Data</td><td>Optional use.</td></tr>
<tr><td>Activity Type</td><td>Click the LOV to make a selection. This filters the Course Catalog to select one of the nine OPM training types.</td></tr>
<tr><td>Course Name</td><td>Click the LOV and select from the portion of the Course Catalog filtered by Activity Type above; i.e., if you select Medical, you will only select from medical-related training courses.</td></tr>
</table>
</td></tr>
<tr><td>7

</td><td>Click the <OK> button. The completed course data string opens in the Details Region of the Special Information window. Click Save icon in the Toolbar.

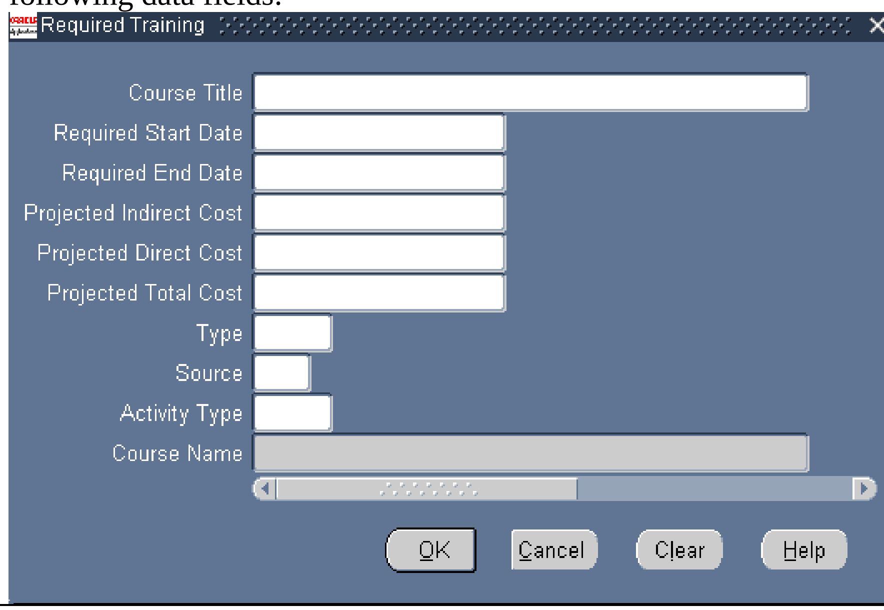
Note: You may record incomplete training, using the same DDF by typing the date in the Date Withdrawn data field, and selecting from the LOV (Incomplete, No Show, or Unsatisfactory) from the Course Grade data field.</td></tr>
</table>

Recording Required Training in HR

Purpose

This section will show you how to record or update Required Training in HR. Required training can be used for the IDP process. It can be accessed by the Supervisor, Training Coordinator, or Training Monitor for input purposes. Retrieving data is explained in the next process, Retrieving Completed/Required Training in HR

Recording Required Training

Step	Action
1	Follow Steps 1-5 of the procedure on Recording Completed Training in HR.
2	On the ***Required Training*** Descriptive Flexfield, complete the following data fields: 

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Recording Required Training in HR, Continued

Recording Required Training (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2
(cont)</td><td>
<table>
<tr><th>Data Field</th><th>Description/Action</th></tr>
<tr><td>Course Title (60 characters)</td><td>Type in the course title. Required field. ALL CAPS</td></tr>
<tr><td>Required Start Date</td><td>Type in the date. Required field.</td></tr>
<tr><td>Required End Date</td><td>Type in the date. Required field.</td></tr>
<tr><td>Projected Indirect Cost</td><td>Type in dollar amount. Optional field.</td></tr>
<tr><td>Projected Direct Cost</td><td>Type in dollar amount. Optional field.</td></tr>
<tr><td>Type</td><td>Click the LOV. Optional field. This is a combined table, query with %AR_% for Army, etc.</td></tr>
<tr><td>Source</td><td>Click the LOV. Optional field.</td></tr>
<tr><td>Course Category</td><td>Click the LOV to filter the Course Catalog to select one of the nine OPM training types. Optional field.</td></tr>
<tr><td>Course Name</td><td>Click the LOV to select from the portion of the Course Catalog filtered above; i.e., if you select Medical, you will only select from medical-related training courses. Optional field.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>Click the <OK> button. The Detail data field populates with a string of data.</td></tr>
<tr><td>5</td><td>Save your action.</td></tr>
</table>

Retrieving Completed/Required Training in HR

Purpose

This section will show you how to retrieve Completed and Required training information from Oracle HR. These retrievals can be accomplished for a specific employee's record or for a list of employees with similar training experiences. The information can be exported to another format and manipulated as needed.

Who Does It

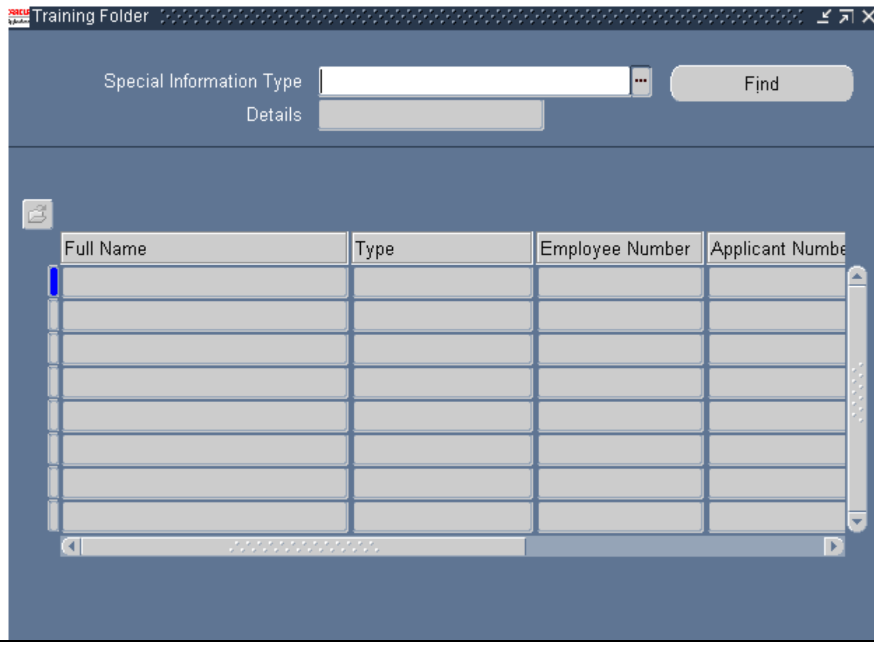
Components will determine level of access to employee records.

Retrieving Training Data on Individual Employees

Step	Action
1	Follow Steps 1-5 of the procedure on Recording Completed Training in HR to retrieve an employee's record.
2	If the ***Information Exists*** checkbox is selected, data is available. The **Details** Region indicates the ***Start and End Date*** data fields of the Completed Training. There is a ***Detail*** data field and a blank DDF. Place your cursor in the ***Detail*** data field in the **Details** Region and double click. **Note:** Since only eight entries display on the window, the count at the bottom of the window shows the total number of completions.
3	The **Completed Training** DDF opens with completed training data. You can do a screen print to capture each event, use your agency's query tool, or use the Civilian Servicing Unit (CSU) to capture a report on the employee's training.
4	Exit the window.

Retrieving Training in HR for a List of Employees

Retrieving Training for a List of Employees

Step	Action
1	**Navigation Path** → *Special Information* → *View Employees by SIT* → **<Open>**.
2	The **List People by Special Information** window opens with nine data fields and a blank Descriptive Flexfield. Click the bottom scroll bar to view the second half of the window: 
3	With your cursor in ***Special Information Type*** data field, click the LOV. (The shortcut method is to input “%Completed Training%” or “%Required Training%” in the data field and click Enter.)

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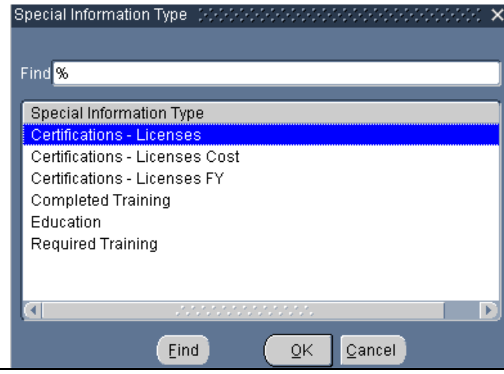
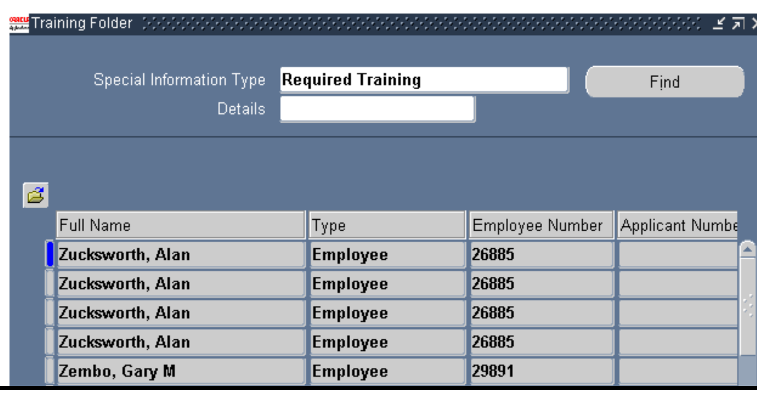
Retrieving Training in HR for a List of Employees, Continued

Retrieving Training for a List of Employees (continued)

Step	Action
4	Select ***Completed Training, Required Training,*** or ***Education*** from the LOV and click **<OK>**. 
5	The Special Information Type field populates with ***Completed Training***, ***Required Training,*** or ***Education*** and the blank DDF opens.
6	Type a Course Title and click **<OK>**. This returns you to the **List People by Special Information** Window and creates the flexfield string for the ***Details*** data field of the **List People by Special Information** window. This string is used as part of your query criteria.
7	Click the <**Find>** button located next to the ***Special Information Type*** data field.
8	The data fields populate with the Full Name, Type, Start and End Date, of the employees who have completed the identified course for a total of eight names.
9	If you want to print a copy, you may want to export the names into an Excel spreadsheet following the procedure on the next page; otherwise, your screen print will display only eight attendees at a time. 

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Obtaining a List of Names

Purpose

This procedure will guide you through the steps to obtain a list of names for a specific Event and their status.

Who Does It

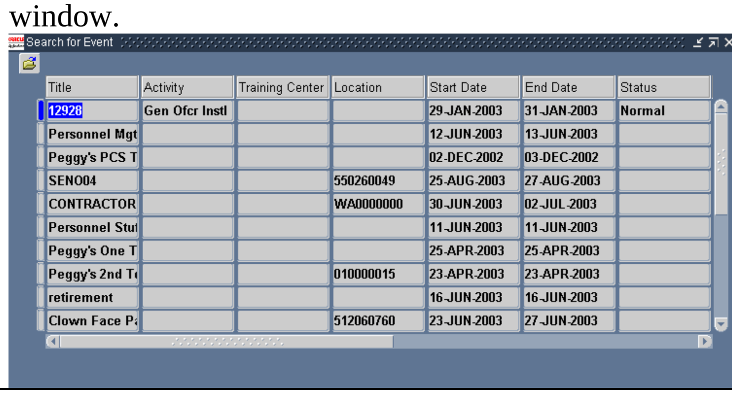
Components will determine the level of access to employee records.

Before You Begin

The previous process, Retrieving Training in HR for a List of Employees, is limited to those who have Completed or are Required to take the Event. By using this procedure, you can extract a list of names which can be used for:

- Class rosters for classroom instructors.
- Alternates **Wait Listed** for an Event.
- Reports.

Obtaining a List of Names

Step	Action
1	**Navigation Path** → *Enrollments* → *Student* → **<Open>**. The **Search for Event** window opens.
	Query the **Search for Event** window to locate the Event. With the **Current Record Indicator** on the Event you need, exit the window. 
	The **Enrollment Summary** window populates with the *Students* and *Event*. The Event Title also opens on the Title Bar. The status of each student; e.g., Completed and Placed, is shown in the *Enrollment Status* column, alphabetical by Enrollment Status. **Note:** As the window opens only eight names at a time, click Query on the Main Menu and click Count Matching Records. The total number opens at the bottom of the window.

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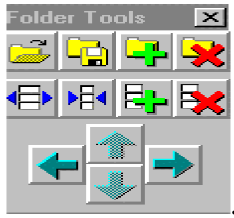
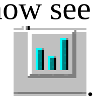
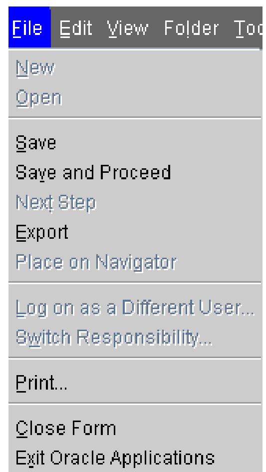
Obtaining a List of Names, Continued

Obtaining a List of Names (continued)

Step	Action
4	If you want to sort the names by Enrollment Status before your next action, remember you can sort only the first three columns. Click the **Folder Tools** button on the Toolbar, which becomes enabled when you navigate to a folder block .
5	The **Folder Tools Palette** opens  . To move a data field, click in the data field and then click the Move Left button on the Palette. Only the first three data fields can be sorted so move the Enrollment Status to one of the first three positions.
6	Click **<u>F</u>older** on the Main Menu and click **Show Order <u>B</u>y**. You will now see an **Order By** button under each of the first three data fields . Click the button of a data field you want to sort. Click the button again until the message line opens the desired sort setting: • Ascending • Descending • No Ordering **Note:** If you define multiple sorts, the records display in the order of the first data field's sort. Then, within that first sort order, the records display by the sort in the second data field and so on for the third data field.
7	Since you can print only eight names at a time, you may want to export them into an Excel spreadsheet following the procedure, Exporting Retrieved Data, in this chapter.

Exporting Retrieved Data

Exporting Retrieved Data

Step	Action
1	With the **List People by Special Information** window or other folder information such as **Enrollment Summary** displaying the information you want to export, click **File** on the Main Menu Bar then click **Export**. You can hide columns in OTA you don't want to export. 
2	The **Export** window opens. Click the Drives drop-down menu and select your shared drive. If you do not have a shared drive, use your C:\ TEMP drive as you will save it later in Excel. Select desired Folder in the Folders menu. Type in your file name under File name data field. Click <**OK**>.
3	The **Export Data** window opens with your file name. Make a note where you have stored it in order to retrieve it later.
4	Open an Excel spreadsheet, then click File and Open. Locate the file you saved
5	The information populates in the spreadsheet. You may now format it in whatever you need, export to managers, etc.
6	Save your Excel worksheet to a folder you have set up for that purpose with an extension.xls.

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